

# Regional Health Services & Local Partnerships

Workforce Development Board

February 4, 2016

Data source: Economic Modeling Specialists International (EMSI)  
[www.economicmodeling.com](http://www.economicmodeling.com)

# **EMSI 2015.3**

# Industry vs. Cluster

## Health Care & Social Assistance Industry

- 14,331 jobs
- Avg. wage \$42,918
- Projected change:  
50% or 5,356 jobs

## Health Services Cluster

- 17,016 jobs
- Avg. wage \$44,567
- Projected change:  
41% or 5,575

# Industry

## -Health Care & Social Assistance

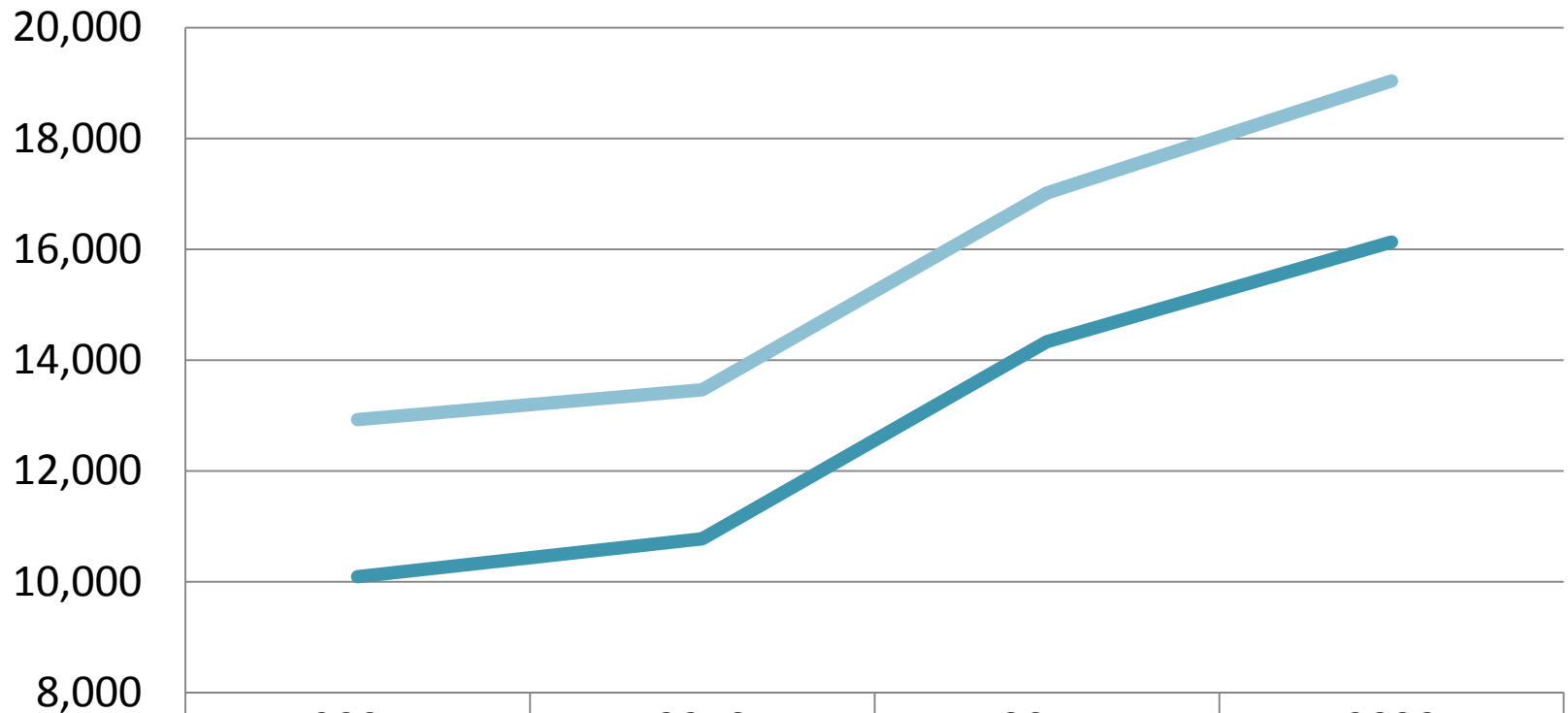
- NAICS code 62

# Cluster

## -Health Services-

- Includes majority of NAICS code 62
- Additionally includes industries:
  - State Government Hospitals
  - Optical Goods Stores
  - Home Health Equipment
  - Research & Development
  - Insurance Agencies
- Sub-clusters
  - Allied Health
  - Residential Care & Rehabilitation Services

# Health Industry & Cluster Growth SLO County



	2005	2010	2015	2020
Industry	10,090	10,774	14,331	16,130
Cluster	12,925	13,467	17,016	19,042

# Industry Size

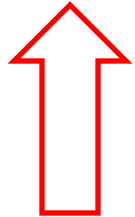
## -Health Care & Social Assistance-

### Section 1a- Industries: Industry by Total Employees

Largest Industries by Total Employees, sorted largest to smallest (2015 Jobs)

California	SLO County	Coastal	North County	SLO City	South County
Government 2,673,164 Jobs	Government 21,684 Jobs	Accommodation & Food Services 1,442 Jobs	Retail Trade 4,522 Jobs	Government 14,433 Jobs	Accommodation & Food Services 3,869 Jobs
Health Care & Social Assistance 2,094,188 Jobs	Accommodation & Food Services 15,194 Jobs	Retail Trade 783 Jobs	Health Care & Social Assistance 4,360 Jobs	Health Care & Social Assistance 6,751 Jobs	Government 3,383 Jobs
Retail Trade 1,663,956 Jobs	Health Care & Social Assistance 14,331 Jobs	Health Care & Social Assistance 708 Jobs	Crop & Animal Production 3,920 Jobs	Retail Trade 5,169 Jobs	Retail Trade 2,960 Jobs

4th largest industry in  
South County with 2,462 jobs



# Growth

## -Health Care & Social Assistance-

Actual Growth Industries, by total jobs, sorted highest to lowest (2010-2015)

California	SLO County	Coastal	North County	SLO City	South County
Health Care & Social Assistance 608,383 Jobs	Health Care & Social Assistance 3,557 Jobs	Health Care & Social Assistance 231 Jobs	Health Care & Social Assistance 1,624 Jobs	Health Care & Social Assistance 922 Jobs	Health Care & Social Assistance 770 Jobs
Accommodation & Food Services 271,457 Jobs	Construction 2,154 Jobs	Accommodation & Food Services 180 Jobs	Construction 1,075 Jobs	Government 736 Jobs	Construction 523 Jobs
Professional, Scientific, & Technical Services 236,348 Jobs	Accommodation & Food Services 1,896 Jobs	Admin. & Support & Waste Mgmt. & Remediation Svcs. 137 Jobs	Manufacturing 564 Jobs	Admin. & Support & Waste Mgmt. & Remediation Svcs. 664 Jobs	Accommodation & Food Services 491 Jobs

**Note:** In the South County region, the *Mining, Quarrying, & Oil & Gas Extraction* has insufficient data for 2010-2015 change & 2010-2015 percent change.



# Projected Growth

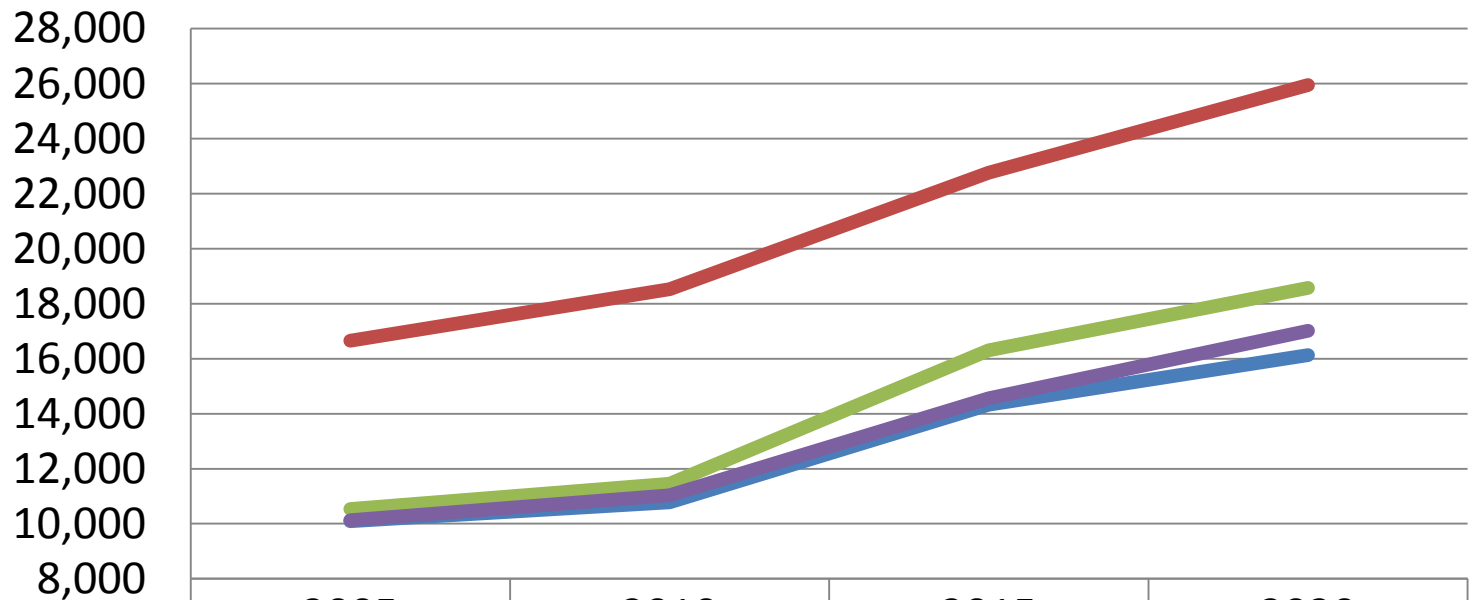
## -Health Care & Social Assistance-

Projected Growth Industries, by total projected job change, sorted highest to lowest (2010-2020)

California	SLO County	Coastal	North County	SLO City	South County
Health Care & Social Assistance 963,750 Jobs	Health Care & Social Assistance 5,356 Jobs	Health Care & Social Assistance 344 Jobs	Health Care & Social Assistance 2,278 Jobs	Health Care & Social Assistance 1,586 Jobs	Health Care & Social Assistance 1,133 Jobs
Accommodation & Food Services 426,625 Jobs	Accommodation & Food Services 3,410 Jobs	Real Estate & Rental & Leasing 311 Jobs	Construction 1,326 Jobs	Admin. & Support & Waste Mgmt. & Remediation Services 1,507 Jobs	Accommodation & Food Services 869 Jobs
Professional, Scientific, & Technical Services 374,812 Jobs	Admin. & Support & Waste Mgmt. & Remediation Services 3,319 Jobs	Accommodation & Food Services 298 Jobs	Admin. & Support & Waste Mgmt. & Remediation Services 1,220 Jobs	Government 1,344 Jobs	Retail Trade 583 Jobs

**Note:** In the South County region, the *Mining, Quarrying, & Oil & Gas Extraction* has insufficient data for 2010-2020 Change & 2010-2020 Percent Change.

# Health Care Industry Growth By Region

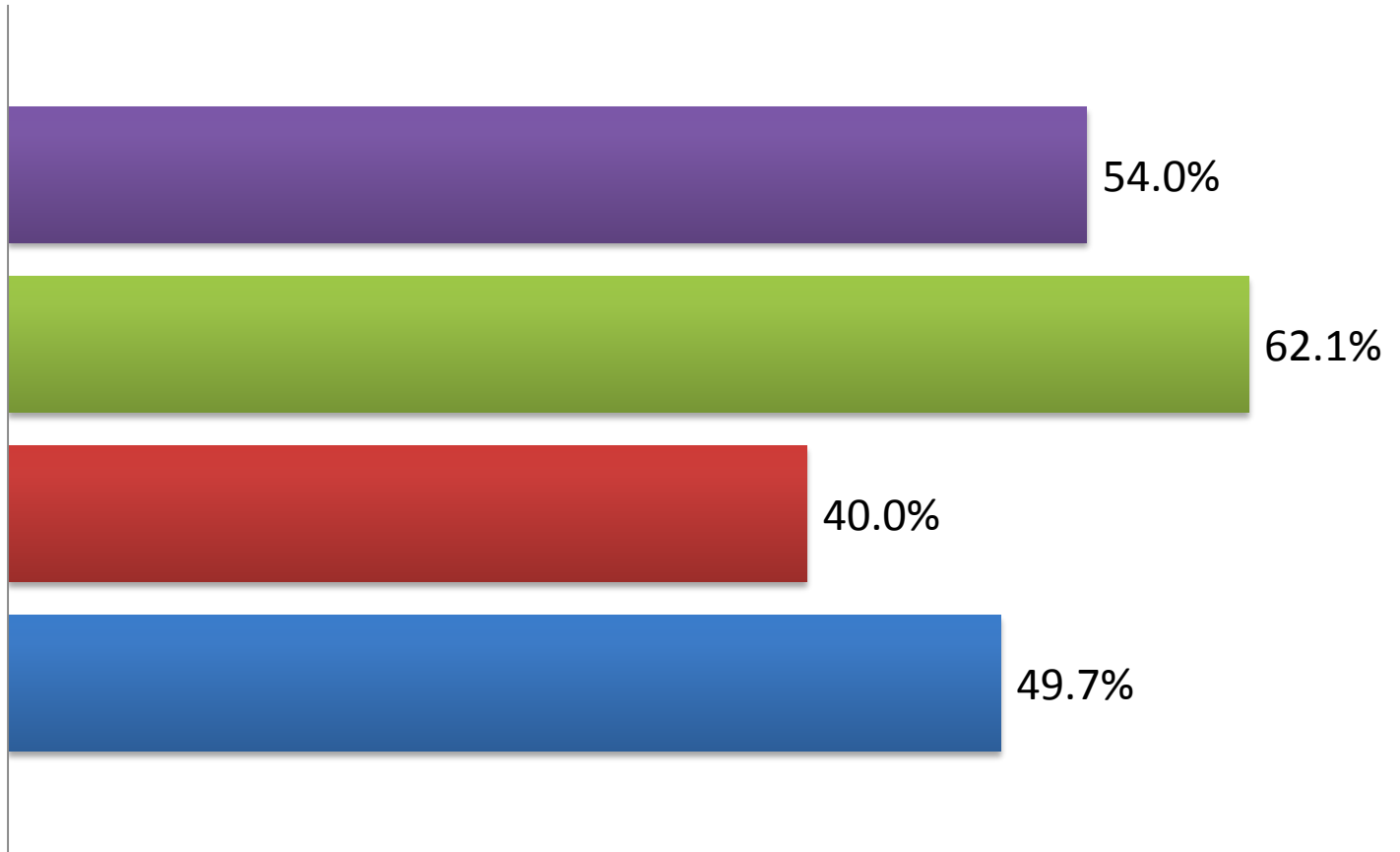


	2005	2010	2015	2020
San Luis Obispo	10,090	10,774	14,331	16,130
Santa Barbara	16,650	18,530	22,760	25,947
Monterey	10,533	11,458	16,309	18,572
Santa Cruz	10,122	11,040	14,565	17,011

# Regional Projected Growth 2010-2020 by Health Care Industry

■ Santa Cruz ■ Monterey ■ Santa Barbara ■ San Luis Obispo

Projected Growth

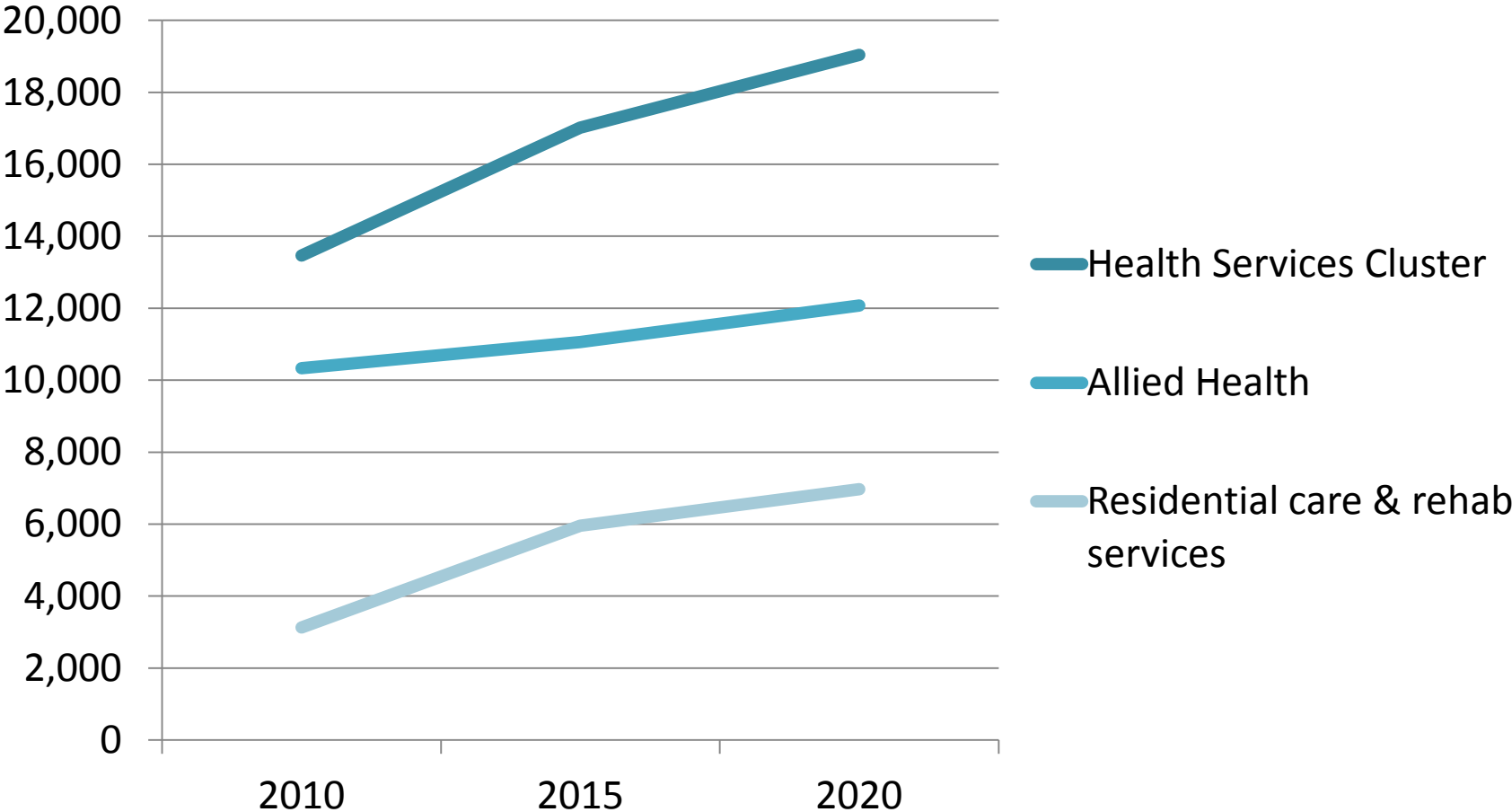


# Cluster

## -Health Services-

- Includes majority of NAICS code 62
- Additionally includes industries:
  - State Government Hospitals
  - Optical Goods Stores
  - Home Health Equipment
  - Research & Development
  - Insurance Agencies
- Sub-clusters
  - Allied Health
  - Residential Care & Rehabilitation Services

# Health Services Cluster Growth SLO County



# Regional Health: Priority Sectors

- SLO
  - Health Services
- Santa Barbara
  - Healthcare
- Monterey
  - Healthcare
- Santa Cruz
  - Health and Fitness

Health Services

# **SAN LUIS OBISPO COUNTY**

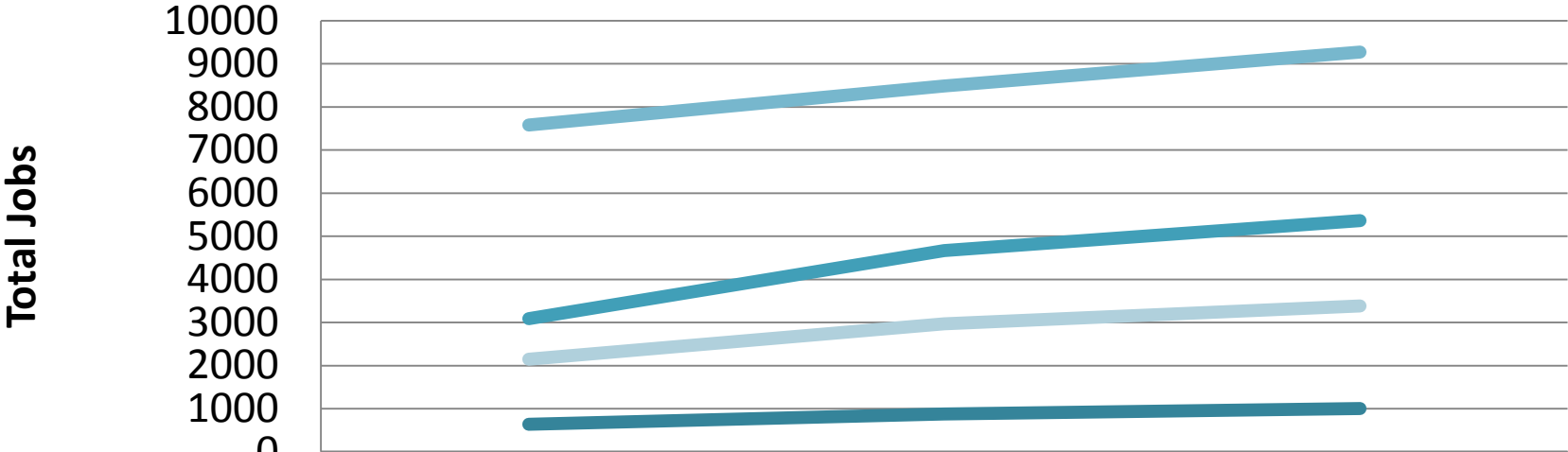
# SLO County

	Total Jobs	Actual Change 2010-2015	Projected Change 2010-2020	Avg. Earnings Per Job 2014
Health Care & Social Assistance Industry	14,331  6% <b>below</b> national avg.	33.0%  3,557 jobs	49.7%  5,356 jobs	\$52,201  Nation \$55,728
Health Services Cluster	17,016  4% <b>above</b> national avg.	26.4%  3,549 jobs	41.4%  5,575 jobs	\$55,789  Nation \$59,725
Allied Health Sub-Cluster	11,057  0% <b>above</b> national avg.	7.0%  723 jobs	16.8%  1,740 jobs	\$71,005  Nation \$73,370
Residential Care & Rehab Services Sub- Cluster	5,960 jobs  13% <b>above</b> national avg.	90.2%  2,827 jobs	122.4%  3,835 jobs	\$27,558  Nation \$31,168



# Growth by SLO County Regions

## Health Services Cluster

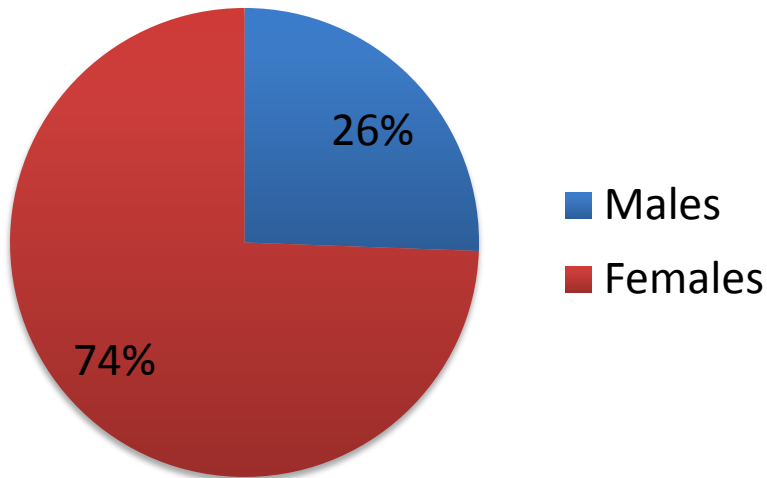


	2010	2015	2020
Coastal	636	878	1,006
North County	3,085	4,669	5,361
SLO City	7,584	8,487	9,276
South County	2,148	2,969	3,385

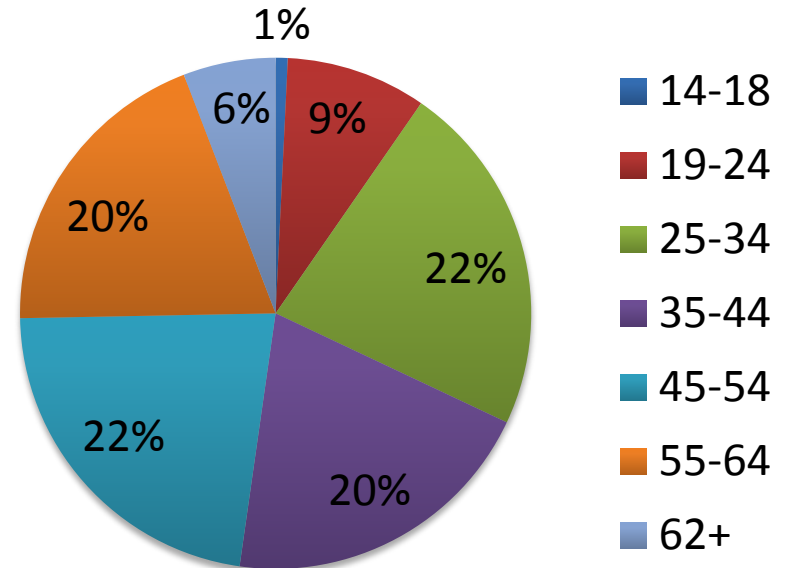
# Health Services

## SLO County Demographic overview

### Industry Gender Breakdown



### Industry Age Breakdown



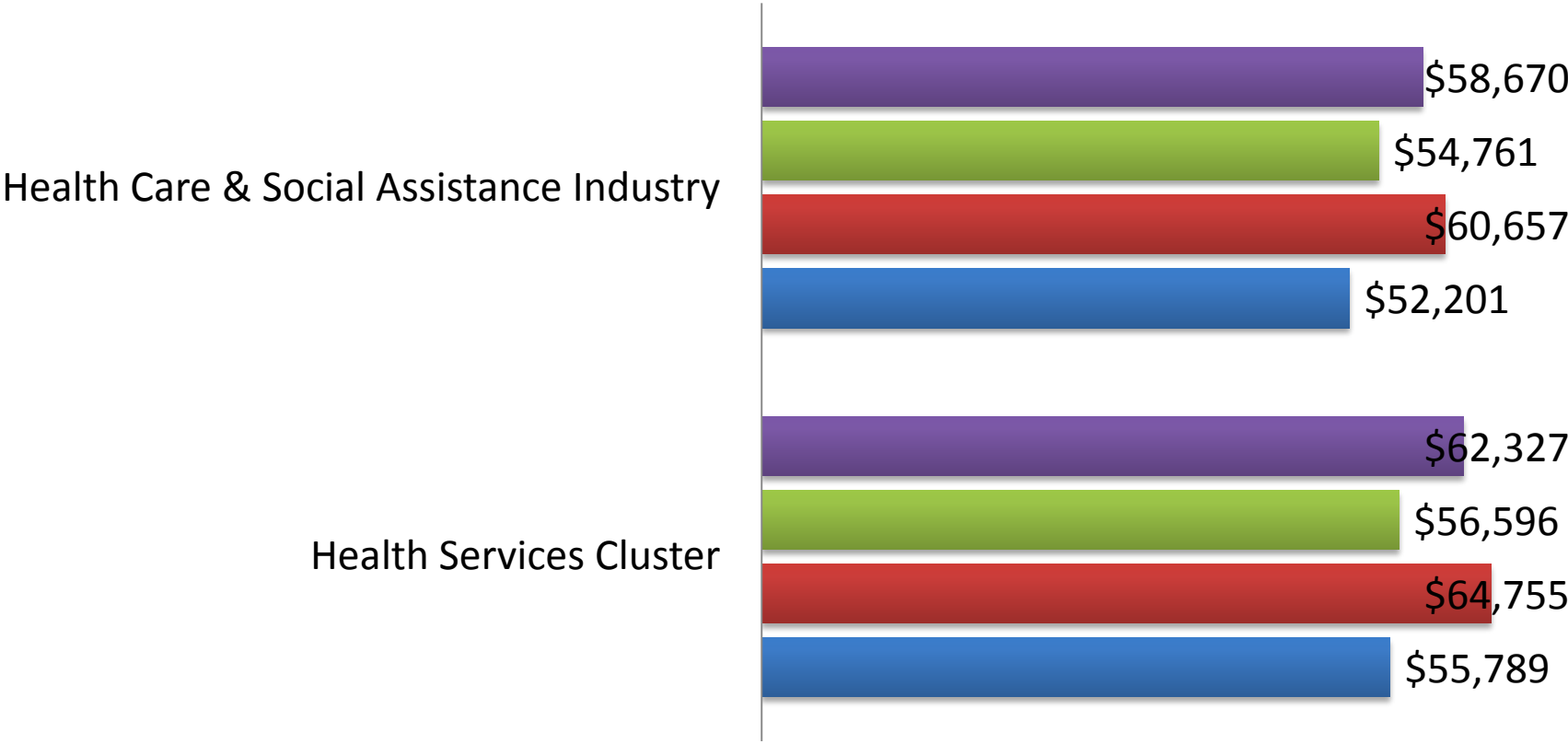
# **EARNINGS & WAGES**

# Occupational Tiers

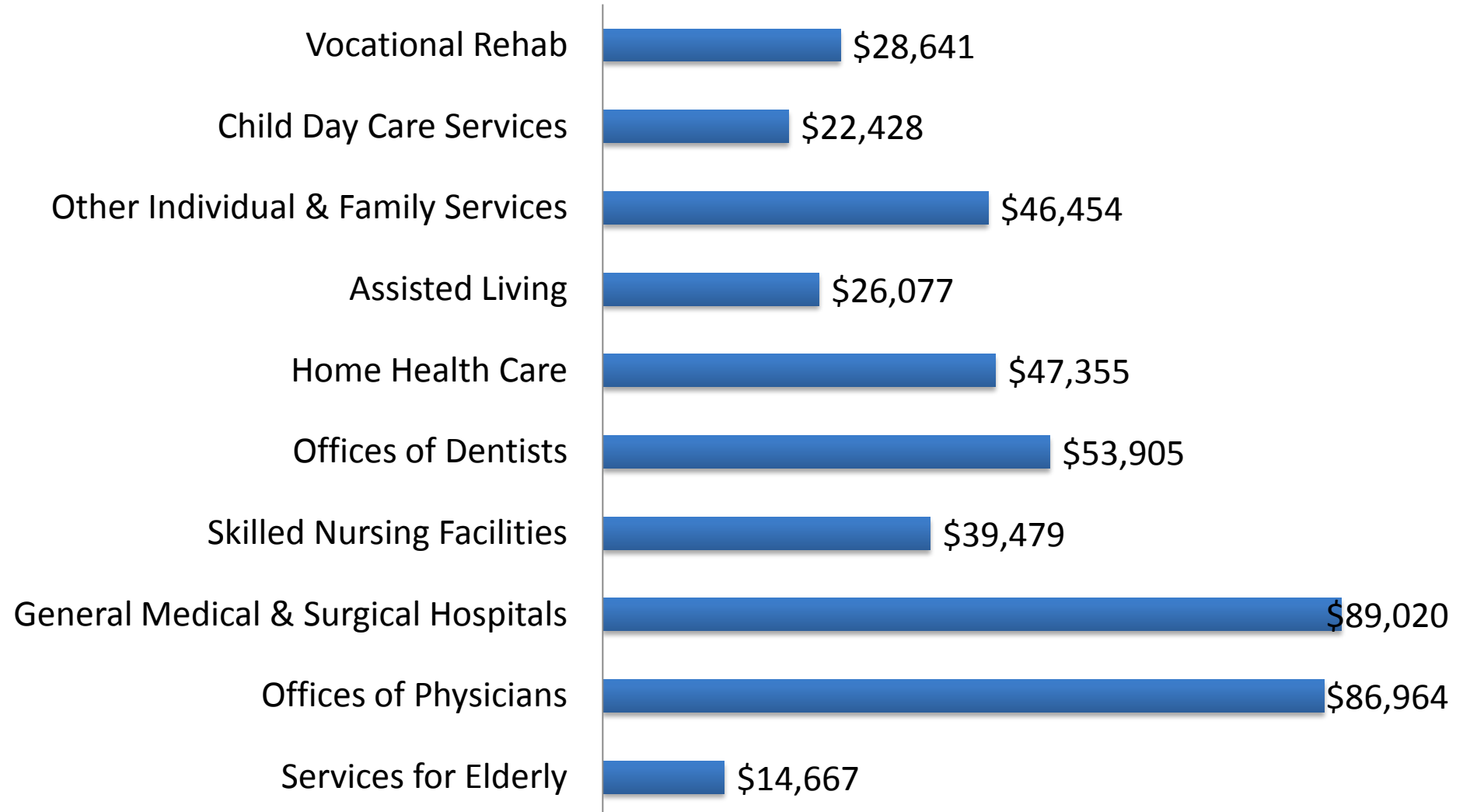
- Tier 1 Occupations
  - High pay, high skill
  - Avg. earnings in SLO Co. \$40.58/hour or \$84,400/yr
- Tier 2 Occupations
  - Middle wage, middle skill
  - Avg. earnings in SLO Co. \$22.87/hour or \$47,600/yr
- Tier 3 Occupations
  - Low wage, lower skill service positions
  - Avg. earnings in SLO Co. \$12.42/hour or \$25,800/yr

# Total Earnings

■ Santa Cruz ■ Monterey ■ SB County ■ SLO County



## SLO County



# Current Total Earnings vs. Current Wages, Salaries & Proprietor Earnings

Top Industry by total jobs	Annual Avg. Current Total Earnings	Annual Avg. Employee Wages, Salaries, & Proprietor Earnings
Offices of Physicians	\$86,964	\$71,927
General Medical and Surgical Hospitals	\$89,020	\$73,664
Hospitals (State Government)	\$80,320	\$52,378
Offices of Dentists	\$53,905	\$44,584
Home Health Care Services	\$47,355	\$39,166
Services for the Elderly and Persons with Disabilities	\$14,667	\$11,978
Nursing Care Facilities (Skilled Nursing Facilities)	\$39,479	\$31,384
Assisted Living Facilities for the Elderly	\$26,077	\$20,730
Other Individual and Family Services	\$46,454	\$37,822
Child Day Care Services	\$22,428	\$18,296

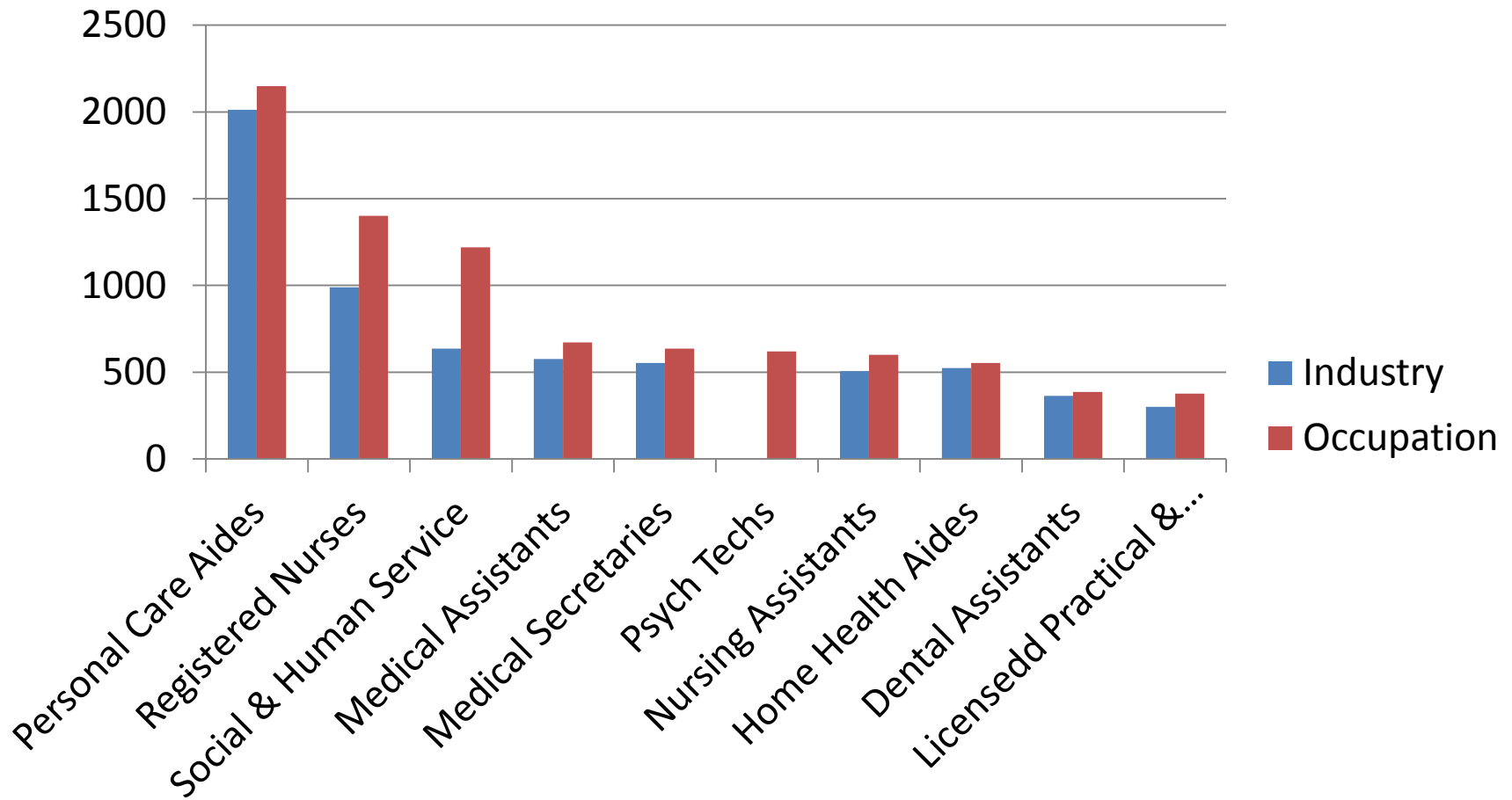
# **TOP HEALTH OCCUPATIONS & JOBS**



# Largest Health Occupations

<b>1.</b>	<b>Personal Care Aides</b>	<b>2,149 jobs</b>
<b>2.</b>	<b>Registered Nurses</b>	<b>1,401 jobs</b>
<b>3.</b>	<b>Social &amp; Human Service Assistants</b>	<b>1,220 jobs</b>
<b>4.</b>	<b>Medical Assistants</b>	<b>671 jobs</b>
<b>5.</b>	<b>Medical Secretaries</b>	<b>636 jobs</b>
<b>6.</b>	<b>Psych Techs</b>	<b>619 Jobs</b>

# Occupations cross Industries



# 1. Personal Care Aide

## Jobs

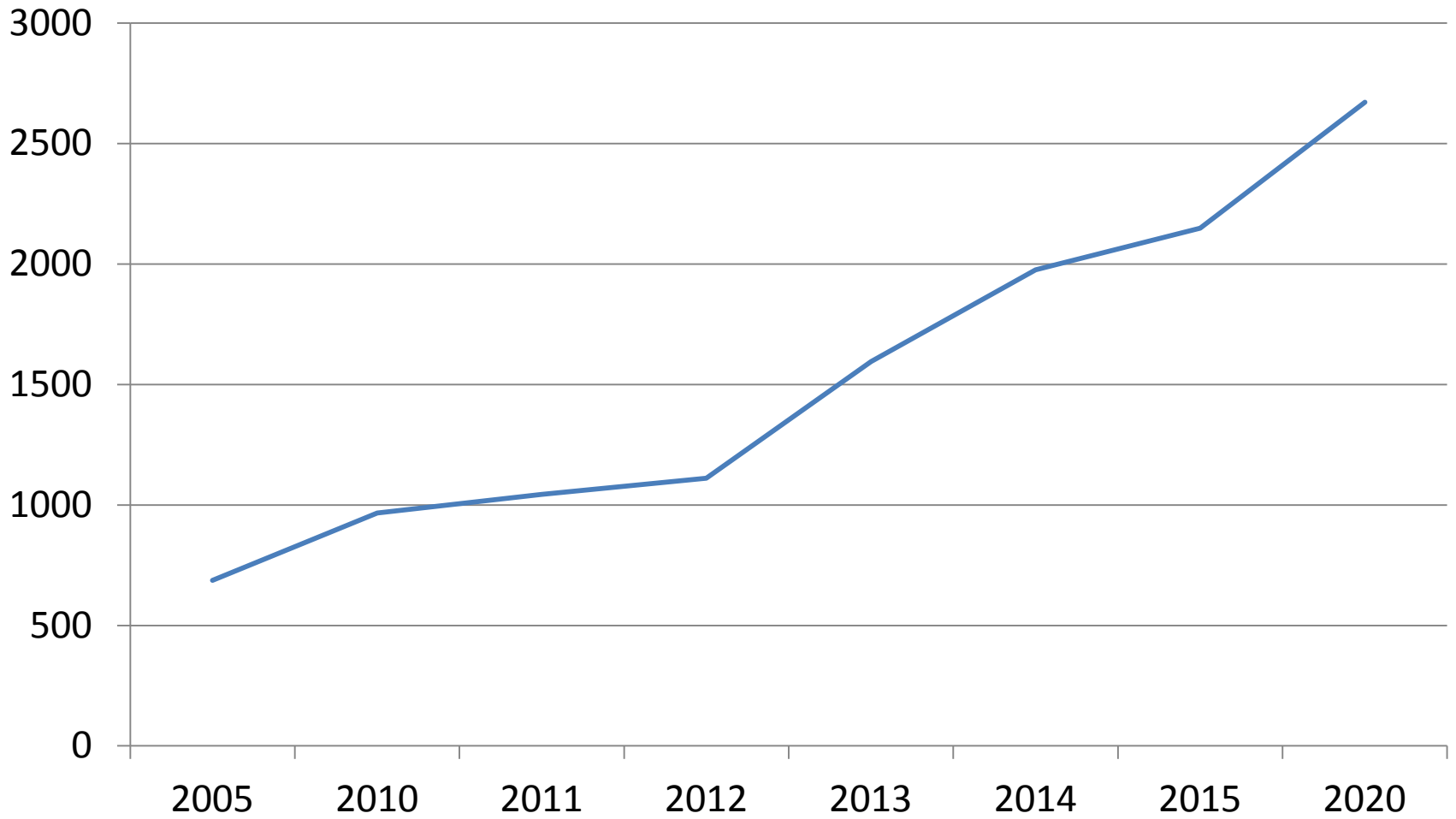
- Total Jobs
  - 2,149 jobs
- Actual 5 year change
  - 122.2%
  - 1,182 jobs
- Projected % Change
  - 176.2%
  - 1,704 jobs

## Earnings

- Median Hourly \$10.69
- Average Hourly \$10.78
- Lowest Hourly \$9.61
- Highest Hourly \$11.83

<b>Education Required</b>	<b>Work Experience Required</b>	<b>Training Required</b>
Less than H.S.	None	Short-term OJT training

## Personal Care Aides



## Industries Employing Personal Care Aides

[Jump to Inverse Staffing Patterns](#) 

Industry	Occupation Jobs in Industry (2015)	% of Occupation in Industry (2015)	% of Total Jobs in Industry (2015)
 Services for the Elderly and Persons with Disabilities	1,418	66.0%	60.9%
 Home Health Care Services	261	12.1%	28.1%
 Assisted Living Facilities for the Elderly	118	5.5%	17.8%
 Residential Intellectual and Developmental Disability Facilities	95	4.4%	38.0%
 Vocational Rehabilitation Services	39	1.8%	12.3%

# 1. Personal Care Aides cont.

## Top Companies Posting

- Res-Care Inc.
- Home Instead Senior Care
- Maxim Homecare
- Amdal In-Home Care, Inc.

## Top Cities Posting

1. San Luis Obispo
2. Arroyo Grande
3. Grover Beach
4. Atascadero
5. Paso Robles

Total Postings	Unique Postings	Job Posting Intensity	Avg. Monthly Postings (12/11-12/15)	Avg. Monthly Hires (12/11-12/15)
61	17	4:1	9	103

# 2. Registered Nurses

## Jobs

- Total Employed
  - 1,401 jobs
- Actual 5 year change
  - 2%
  - 28 jobs
- Projected % Change
  - 10.5%
  - 144 jobs






## Earnings

- Median Hourly \$ 42.79
- Average Hourly \$42.02
- Lowest Hourly \$ 31.61
- Highest Hourly \$52.37

Education Required	Work Experience Required	Training Required
Associate's degree	None	None

## Industries Employing Registered Nurses

[Jump to Inverse Staffing Patterns](#) 

Industry	Occupation Jobs in Industry (2015)	% of Occupation in Industry (2015)	% of Total Jobs in Industry (2015)
 General Medical and Surgical Hospitals	522	37.3%	25.1%
 Hospitals (State Government)	251	17.9%	13.2%
 Home Health Care Services	125	9.0%	13.5%
 Nursing Care Facilities (Skilled Nursing Facilities)	116	8.3%	9.9%
 Offices of Physicians (except Mental Health Specialists)	107	7.6%	4.8%



## 2. Registered Nurses cont.

### Top Companies Posting

- Parlon Corp
- Catholic Healthcare West
- Tenet Healthcare Corp.
- RN Network Inc.
- American Mobility, Inc

### Top Cities Posting

1. San Luis Obispo
2. Templeton
3. Arroyo Grande
4. Atascadero
5. Paso Robles

Total Postings	Unique Postings	Job Posting Intensity	Avg. Monthly Postings (12/11-12/15)	Avg. Monthly Hires (12/11-12/15)
2,099	322	7:1	174	46

# 3. Social & Human Service Assistants

## Jobs

- Total Employed
  - 1,220 jobs
- Actual 5 year change
  - 32.2%
  - 297 jobs
- Projected % Change
  - 37.1%
  - 342 jobs






## Earnings

- Median Hourly \$ 22.84
- Average Hourly \$22.20
- Lowest Hourly \$ 14.17
- Highest Hourly \$29.61

Education Required	Work Experience Required	Training Required
H.S. diploma or equivalent	None	Short term OJT training

## Industries Employing Social and Human Service Assistants

[Jump to Inverse Staffing Patterns](#) 

Industry	Occupation Jobs in Industry (2015)	% of Occupation in Industry (2015)	% of Total Jobs in Industry (2015)
 Grantmaking Foundations	222	18.2%	13.0%
 Services for the Elderly and Persons with Disabilities	178	14.6%	7.6%
 Other Individual and Family Services	151	12.4%	24.9%
 State Government, Excluding Education and Hospitals	116	9.5%	3.7%
 Local Government, Excluding Education and Hospitals	99	8.1%	2.0%

# 3. Social & Human Service Assistants cont.

## Top Companies Posting

- County of SLO
- Cal Poly
- CSU System
- EOCSLO
- State of CA

## Top Cities Posting

1. San Luis Obispo
2. Arroyo Grande
3. Atascadero
4. Paso Robles

Total Postings	Unique Postings	Job Posting Intensity	Avg. Monthly Postings (12/11-12/15)	Avg. Monthly Hires (12/11-12/15)
50	31	2:1	18	77

# 4. Medical Assistants

## Jobs

- Total Employed
  - 671 jobs
- Actual 5 year change
  - 8.4%
  - 52 jobs
- Projected % Change
  - 15.8%
  - 98 jobs





## Earnings

- Median Hourly \$ 14.80
- Average Hourly \$15.53
- Lowest Hourly \$ 11.11
- Highest Hourly \$20.43

Education Required	Work Experience Required	Training Required
Postsecondary non-degree award	None	None

## Industries Employing Medical Assistants

[Jump to Inverse Staffing Patterns](#) 

Industry	Occupation Jobs in Industry (2015)	% of Occupation in Industry (2015)	% of Total Jobs in Industry (2015)
 Offices of Physicians (except Mental Health Specialists)	377	56.2%	16.9%
 General Medical and Surgical Hospitals	47	7.0%	2.3%
 Hospitals (State Government)	46	6.9%	2.4%
 Offices of Chiropractors	35	5.2%	25.1%
 Offices of Optometrists	33	4.9%	14.9%

# 4. Medical Assistants cont.

## Top Companies Posting

- Catholic Healthcare West
- Tenet Healthcare Corp.
- US Government Printing Office
- DaVita Inc
- EOCSLO

## Top Cities Posting

1. San Luis Obispo
2. Atascadero
3. Arroyo Grande
4. Baywood-Los Osos
5. Paso Robles

Total Postings	Unique Postings	Job Posting Intensity	Avg. Monthly Postings (12/11-12/15)	Avg. Monthly Hires (12/11-12/15)
58	29	2:1	15	23

# 5. Medical Secretaries

## Jobs

- Total Employed
  - 636 jobs
- Actual 5 year change
  - 15.2%
  - 84 jobs
- Projected % Change
  - 27.5%
  - 152 jobs

## Earnings






- Median Hourly \$ 17.49
- Average Hourly \$17.57
- Lowest Hourly \$ 12.61
- Highest Hourly \$22.77

Education Required	Work Experience Required	Training Required
H.S. diploma or equivalent	None	Moderate-term OJT training



## Industries Employing Medical Secretaries

[Jump to Inverse Staffing Patterns](#) 

Industry	Occupation Jobs in Industry (2015)	% of Occupation in Industry (2015)	% of Total Jobs in Industry (2015)
 Offices of Physicians (except Mental Health Specialists)	223	35.0%	10.0%
 Offices of Dentists	117	18.4%	11.6%
 General Medical and Surgical Hospitals	85	13.3%	4.1%
 Hospitals (State Government)	34	5.3%	1.8%
 Offices of Chiropractors	23	3.6%	16.3%

# 5. Medical Secretaries cont.

## Top Companies Posting

- Tenet Healthcare Corp.
- Catholic Healthcare West
- DaVita Inc
- Robert Half International Inc.
- Comprehensive Blood & Cancer Medical Care

## Top Cities Posting

1. San Luis Obispo
2. Morro Bay
3. Templeton
4. Atascadero
5. Pismo Beach

---

<b>Total Postings</b>	<b>Unique Postings</b>	<b>Job Posting Intensity</b>	<b>Avg. Monthly Postings (12/11-12/15)</b>	<b>Avg. Monthly Hires (12/11-12/15)</b>
36	14	3:1	6	21

---

# 6. Psych Techs

## Jobs

- Total Employed
  - 619 jobs
- Actual 5 year change
  - -5.5%
  - -36 jobs
- Projected % Change
  - -7.2%
  - -47jobs



## Earnings

- Median Hourly \$22.34
- Average Hourly \$22.62
- Lowest Hourly \$16.33
- Highest Hourly \$31.24

Education Required	Work Experience Required	Training Required
Postsecondary non-degree award	None	Short-term OJT training

## Industries Employing Psychiatric Technicians

[Jump to Inverse Staffing Patterns](#) 

Industry	Occupation Jobs in Industry (2015)	% of Occupation in Industry (2015)	% of Total Jobs in Industry (2015)
 Hospitals (State Government)	492	79.4%	25.9%
 State Government, Excluding Education and Hospitals	72	11.7%	2.3%
 General Medical and Surgical Hospitals	19	3.1%	0.9%
 Residential Mental Health and Substance Abuse Facilities	<10	1.0%	6.3%
 Local Government, Excluding Education and Hospitals	<10	0.8%	0.1%

# 6. Psych Techs cont.

## Top Companies Posting

- US Govt Printing Office
- DaVita Inc
- State of California
- Res-Care, Inc.
- Computer Sciences Corp.

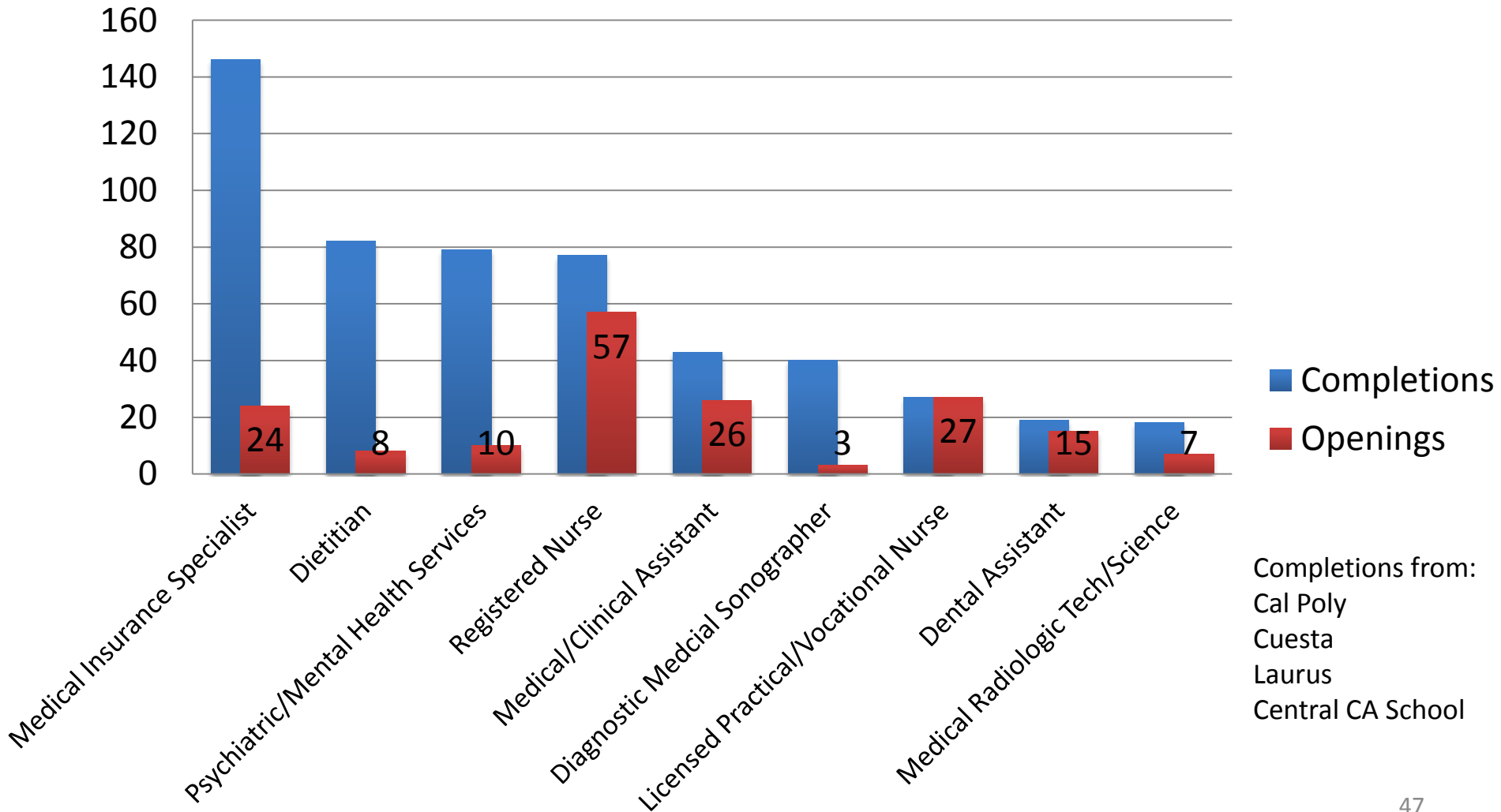
## Top Cities Posting

1. San Luis Obispo
2. Atascadero
3. Pismo Beach
4. Grover Beach

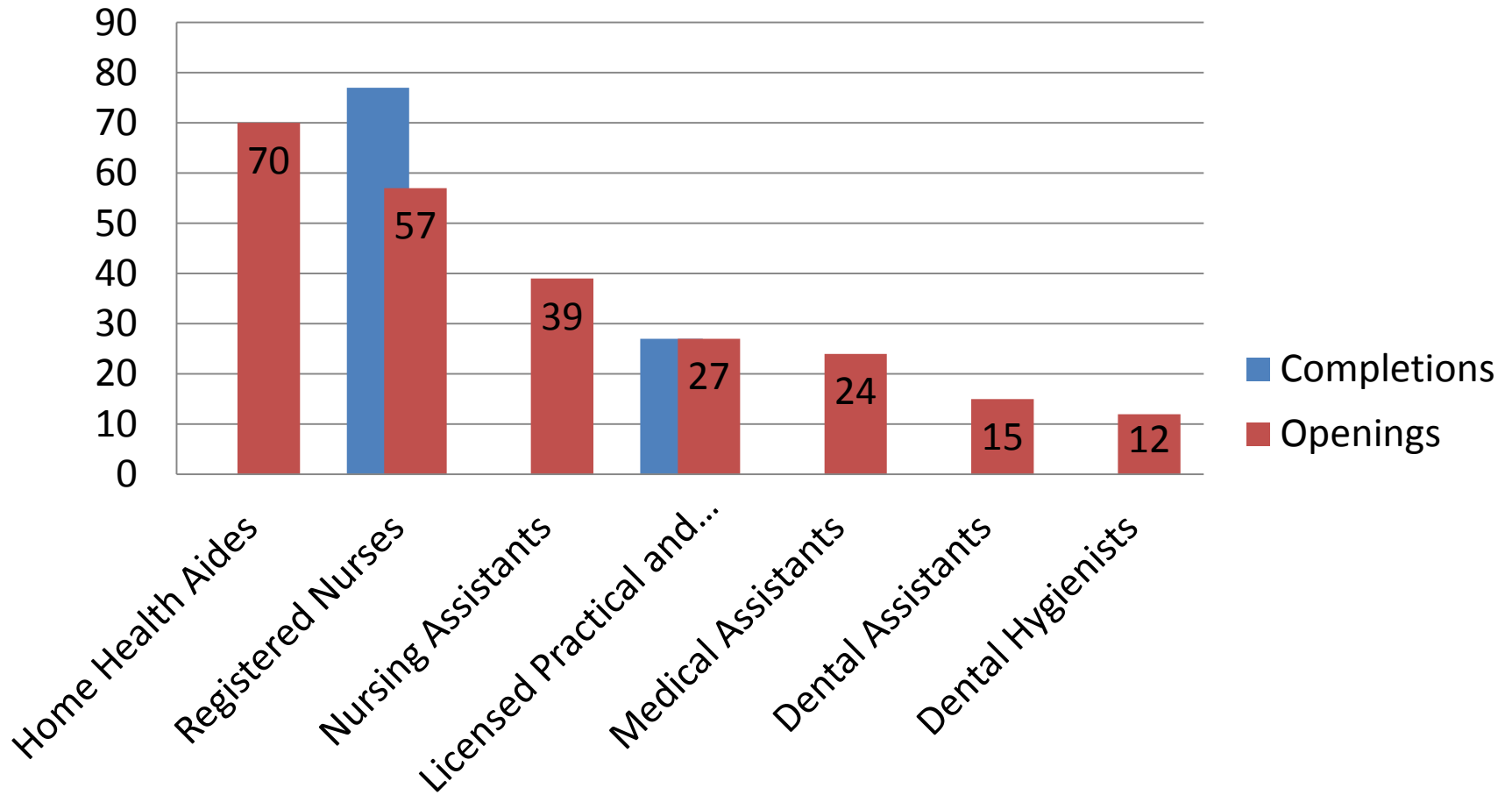
Total Postings	Unique Postings	Job Posting Intensity	Avg. Monthly Postings (12/11-12/15)	Avg. Monthly Hires (12/11-12/15)
25	11	2:1	4	20

# **EDUCATION & TRAINING JOB OPENINGS**

# SLO County Completions vs. Openings



# Regional Openings






# Overall Top Companies Posting

- Catholic Healthcare West
- Tenet Healthcare Corp
- Maxim Home Health
- DaVita Inc.
- Res-Care Inc.
- RN Network Inc.
- American Mobility, Inc.
- Sierra Vista Regional Health Center, Inc.

# Trends

- Size – large across the board
  - Growth - Past Growth & Projected Growth
  - Pay – Tier 2
  - Regionally – aligns
  - Openings and training opportunities
  - Larger companies
- 

# Additional Questions?

- Email to Sarah Hayter at [shayter@co.slo.ca.us](mailto:shayter@co.slo.ca.us)